System Administration Training

SuccessFactors
UNIVERSITY

Presented by: Lauri Durnin

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About the Session Today

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- We hope to give you a solid introduction to Administration
- You will not be an expert
- You can and should get more help after this session if you have questions:
  - If you are currently in implementation, contact your Professional Services Consultant
  - If you are already implemented, contact your Customer Success or Professional Edition Support

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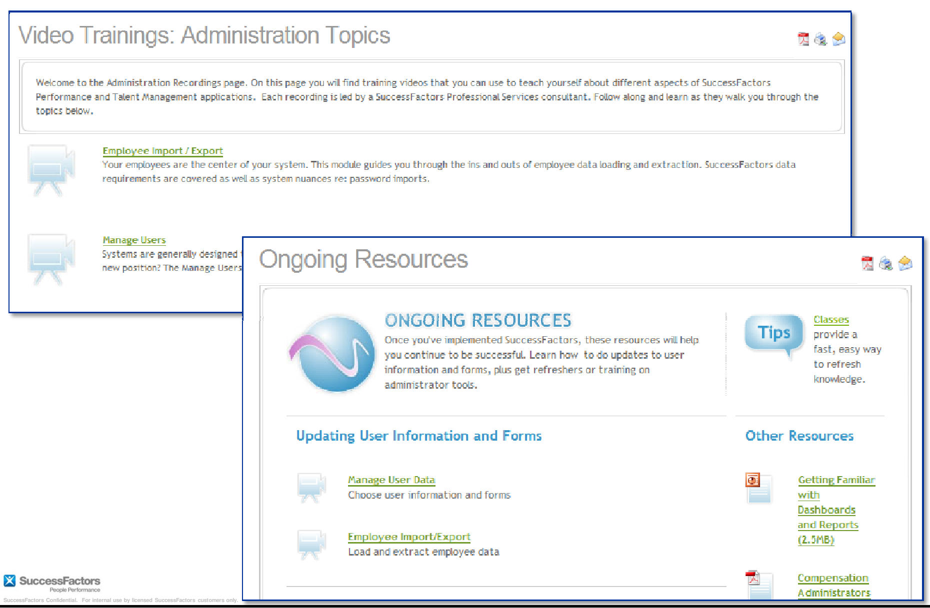
Additional Training

Customer Community
http://community.successfactors.com

Training & Resources

SuccessFactors University

Self-Paced Admin Training



Agenda

- We plan to cover
  - Key roles and responsibilities of the System Administrator
  - Initial set-up
  - Introduction to the Admin Tools tab
  - Core functions
  - Resources

Audience

- Professional Edition
  - Success at Your Pace
- Success Practices
- Enterprise
- Admin Self-Service
- New Users
- Experienced Users
- Full Administrators
- Backup Administrators

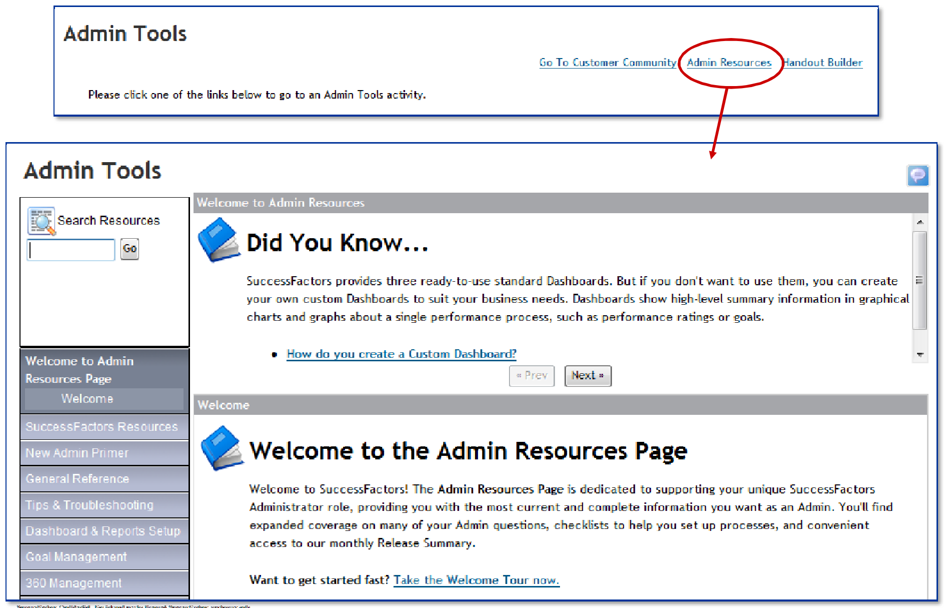
Key Roles and Responsibilities of

- System owner/advocate
  - Serve as the primary contact to your user base and to SuccessFactors
  - Stay current with, and evaluate use of, all updates to the system's functionality
- System administration
  - Manage user information (data imports, passwords)
  - Manage user permissions and privileges
  - Manage all content: forms, competencies and roles
- User support
  - Provide implementation support to HR reps/managers
  - Provide training on new functionality
  - Provide reporting assistance to users (HR, management)
  - Provide coaching/troubleshooting assistance to managers and employees

Introduction to the Admin Tools Tab

- Manage Users
- Manage Security
- Form Template Administration
- Managing Documents
- Managing Competencies and Skills
- System Properties
- Dashboards/Reports
  - Covered separately in Reports and Analytics

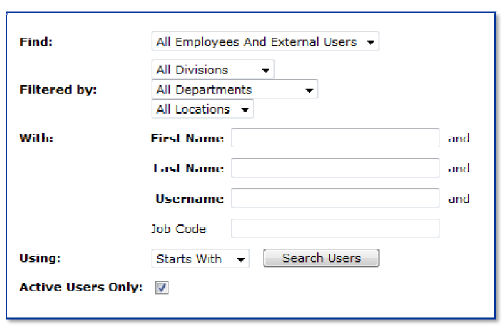
On-Line Administration Resources



Admin Tools Search

Search is consistent where applicable:

Find:	All Employees
Filtered by:	All Divisions All Departments Locations
With:	First Name Last Name Username Job Code
Using:	Starts With or Exact Match
Users:	ACTIVE or ALL (Default is ACTIVE)



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Managing Permissions (Manage Security)

Manage Security

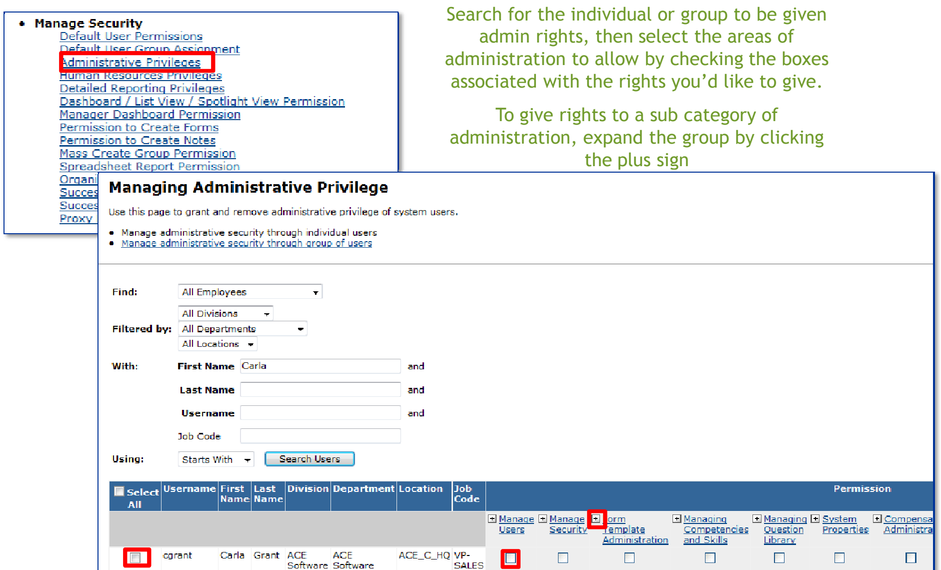
Most Commonly Use:

- Default User Permissions
- Administrative Privileges
- Proxy Management

Managing Permissions - Key Permissions

- Default user permissions – everyone who is loaded in database is allowed to do what? (e.g. performance notes)
- Default user group assignment_– who has permission to log in?
- Admin privileges – who is allowed to perform some or all administrative functions for the company?
- Proxy Management – assigning the permissions of one user (a manager) to another (a team lead) thereby allowing the other to act on their behalf (example: when the manager is on vacation)

Managing Permissions – Administrative Privileges



Search for the individual or group to be given admin rights, then select the areas of administration to allow by checking the boxes associated with the rights you'd like to give.

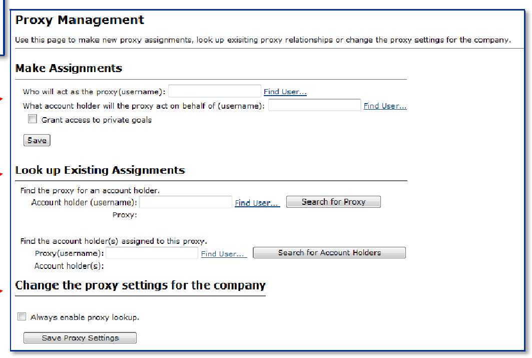
To give rights to a sub category of administration, expand the group by clicking the plus sign

Managing Permissions – Proxy Management

For creating Proxy assignments on behalf of a user

For finding who the Proxy is for a user

For allowing all users to lookup who the Proxy is for a user



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Managing Forms -
pre work, create, support
(Form Template Administration)

Form Template Administration

Most Commonly Use:

- Form Templates
- Mass Create Form Instances

Managing Forms

- **Form Template Administration**
  - Form Templates
  - Routing Maps
  - Rating Scales
  - Mass Create Form Instances
  - Set Corporate Goals
  - Schedule Mass Form Creation

Admin Tools

Back to Admin Tools

Go To Customer Community | Admin Resources | Handout Builder

Managing Form Templates

Use this page to manage existing form templates.

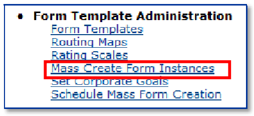
Up to All Forms

2008 Annual Review

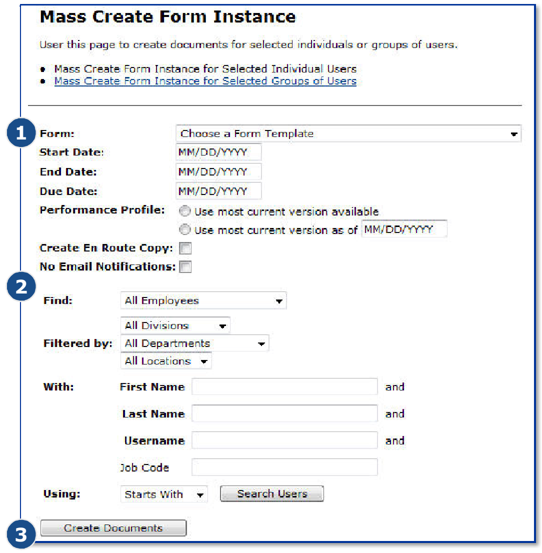
Download Form Template

Template Name:	2008 Annual Review
Template Type:	PM Review
Last Modified:	2008-07-08 13:26:36.0
Routing Map:	MMSPMap
Default Dates for Form Creation:	
○ Default Due Date (in days):	
◉ Specify Start/End/Due Dates(please enter all 3 dates):	
Default Start Date:	01/01/2008
Default End Date:	12/31/2008
Default Due Date:	01/30/2009

Mass Create Form Instance



1. Choose form.
2. Find/Select who is sent the forms.
3. Create Documents



Managing Competencies & Skills

Managing Competencies and Skills

Most Commonly Use:

- Competency Libraries
- Families and Roles
- Legal Scan Library

Competency Element Hierarchies

Competency Libraries – where competencies are managed & sourced (for hard-coding, added by users to forms)

- Libraries
  - Library Categories
    - Competency Name
      - Description
      - Behaviors
      - Teasers (Writing Assistant – first, second & third person)
        - Tuning text (more or less positive text (0,1,2))
        - Coaching Advisor

Families and Roles – where competencies are used/organized by classification scheme (divisional, job family, job, specialization)

- Families
  - Roles
    - Competencies mapped to roles
      - Expected Ratings
      - Weightings
    - Job codes mapped to roles (to allow for auto-population or role competencies to the competency section of form)

Managing Documents

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Managing Documents

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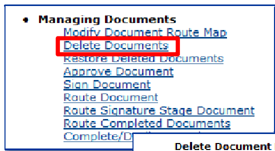
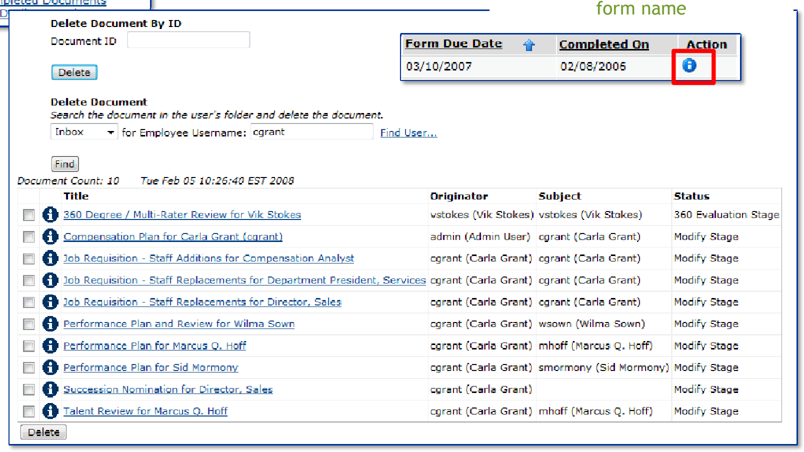
Most Commonly Use:
- Delete Documents
- Restore Deleted Documents
- Route Documents

Managing Documents – Delete Documents

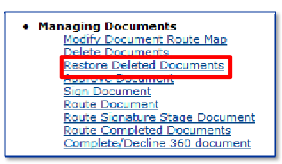


Documents can be deleted by number or by searching the folders of users and selecting the form to be deleted.

Document IDs can be found by clicking on the "i" icon next to a form name

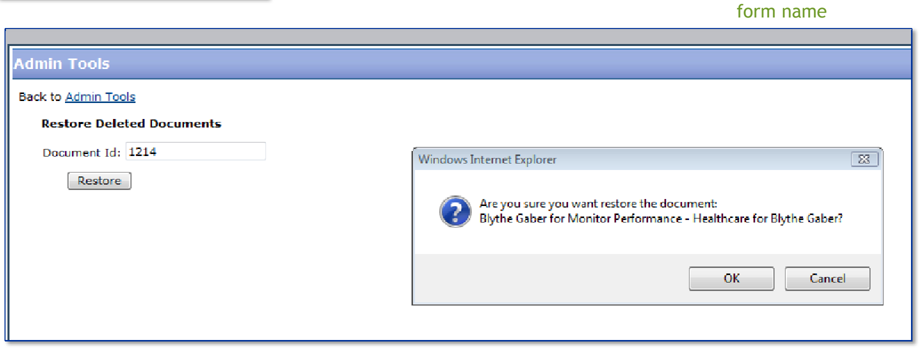


Managing Documents – Restore Deleted Documents



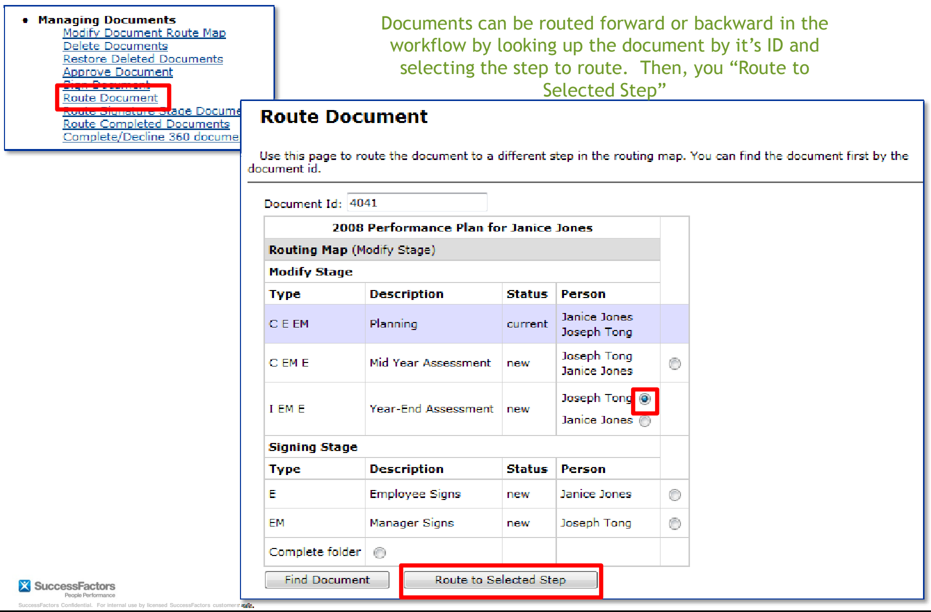
Deleted Documents can be restored if you know the Document ID. Documents IDs can be found by performing a Detailed Doc Search or…

Document IDs can be found by clicking on the "i" icon next to a form name



Managing Documents – Route Documents

Documents can be routed forward or backward in the workflow by looking up the document by it's ID and selecting the step to route. Then, you "Route to Selected Step"



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System Properties

System Properties

Most Commonly Use:

- Password Policy Settings
- OUTLOOK INTEGRATION!
- Email Notification Settings

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Password Policy Settings

- **System Properties**
  - Company Process
  - Data Privacy Consent Statement Settings
  - Bulletin Board Message Settings
  - Password Policy Settings
  - Company System and Logo Settings
  - E-Mail Notification Templates Settings
  - Process Guide Setting
  - Help Link Settings
  - Text Replacement
  - Quick Link Settings
  - Matrix Grid Rating Scales
  - Company Dictionary
  - Change Engine Configuration

These password setting appear beneath the password change area under options for your system users

Password Policy Settings

Use this page to set the Password Policy.

Minimum Length 2

Maximum Length 18

Maximum Password Age (in days) -1

Set to -1 keep passwords from expiring (not recommended)

Maximum Successive Failed Login Attempts 0

Set to 0 will disable this option; The system will lock a user account if successive failed login attempts exceeds what the policy allows, within a 1-minute period.

Case Sensitive (recommended) ☑

Changing this option will force all users to change their passwords

Mixed Case required ☐

Will be ignored if Case Sensitive is not checked

Non-alpha characters required ☐

Enforce Password Encryption ☐

Turning this option OFF from ON will force all users to change their passwords. Turning this option ON will disable the Forgot Your Password feature for password retrieval through emails.

Retrieve Password by providing Email Address ☑

Users will be able to enter their email address to retrieve their password if this option is checked.

Forget Password feature will generate new Password for user ☐

User's password will get reset by the system. The new generated password will send to user through email when the user use the Forget Password feature.

Set Password Policy | Reset

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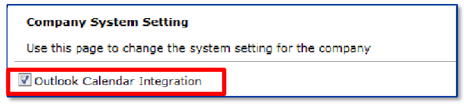
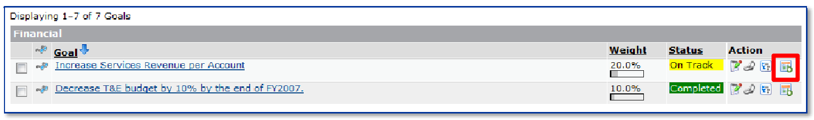
Turning On Outlook Integration

Outlook Integration allows users to add goals and appraisal forms to their Outlook calendar.





When Outlook Integration is enabled, a new icon appears in the Actions column next to each Goal

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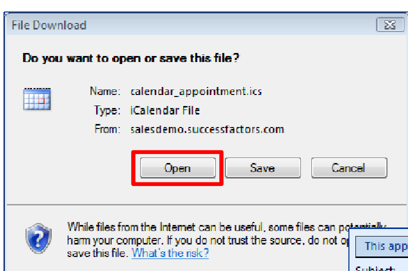
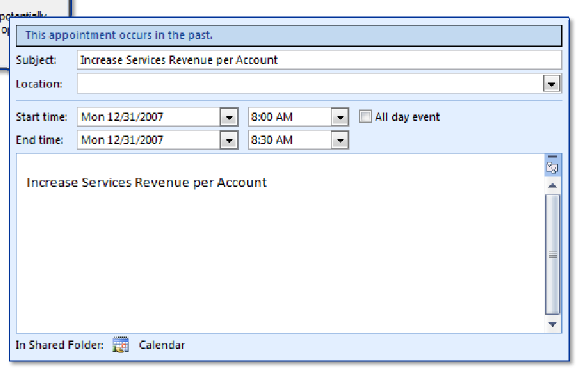
Turning On Outlook Integration



When the Outlook Icon is selected, the iCalendar File Window opens. The user should then open the file and edit the information in the calendar item as necessary.



The Start and End Dates will default to the Due date of the Goal

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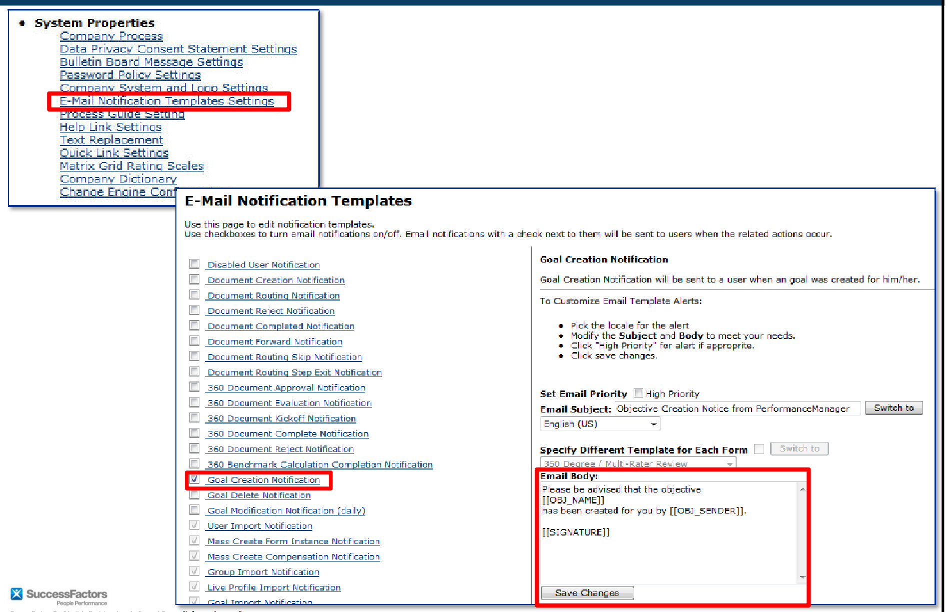
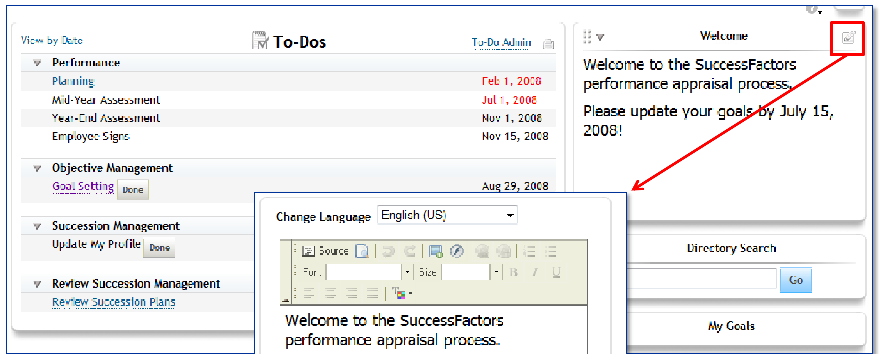
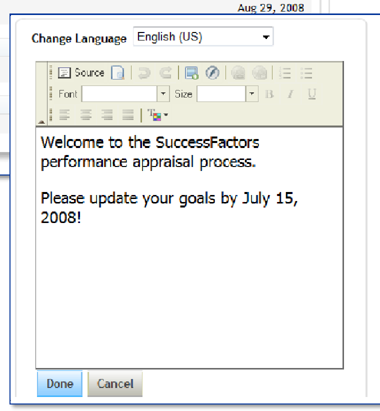
Managing Communications – Common Email Notifications



Customizing ULTRA

Welcome Portlet





Enter rich text, hyperlinks, images, and additional information in the welcome portlet edit window to be displayed on the home page.

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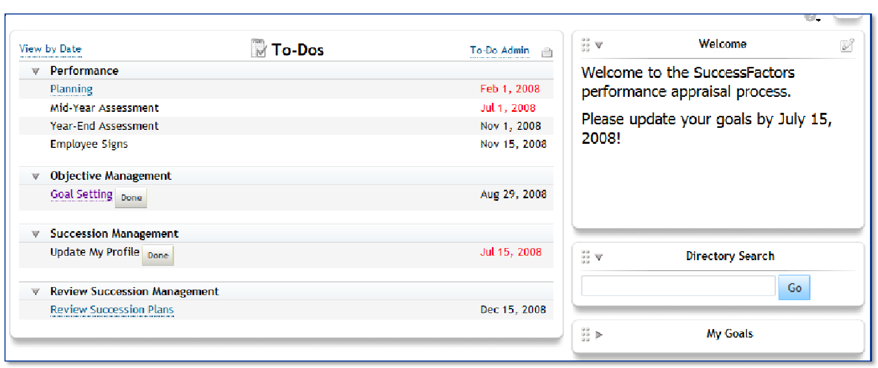
To-Do List

- To-Do list items come from 2 sources: forms routed to the user, and supplemental to-do items added by the administrator.



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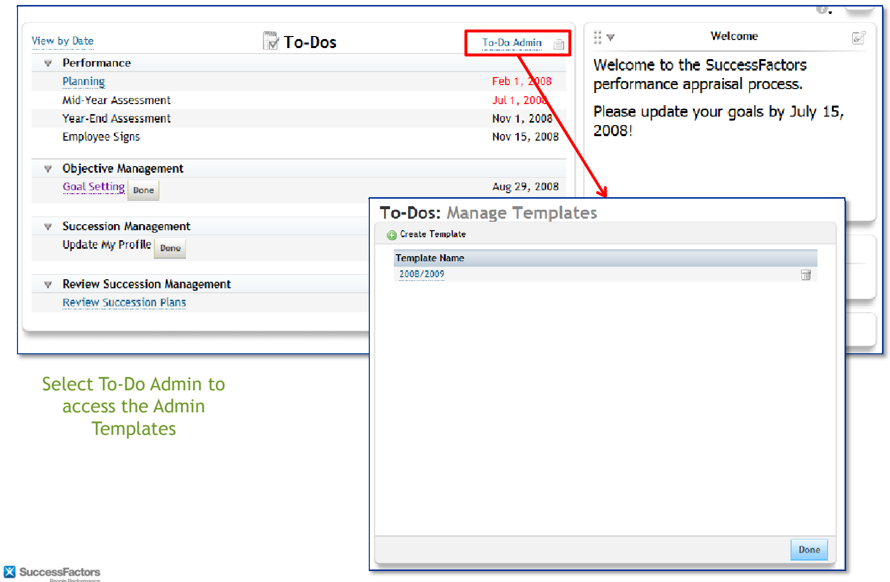
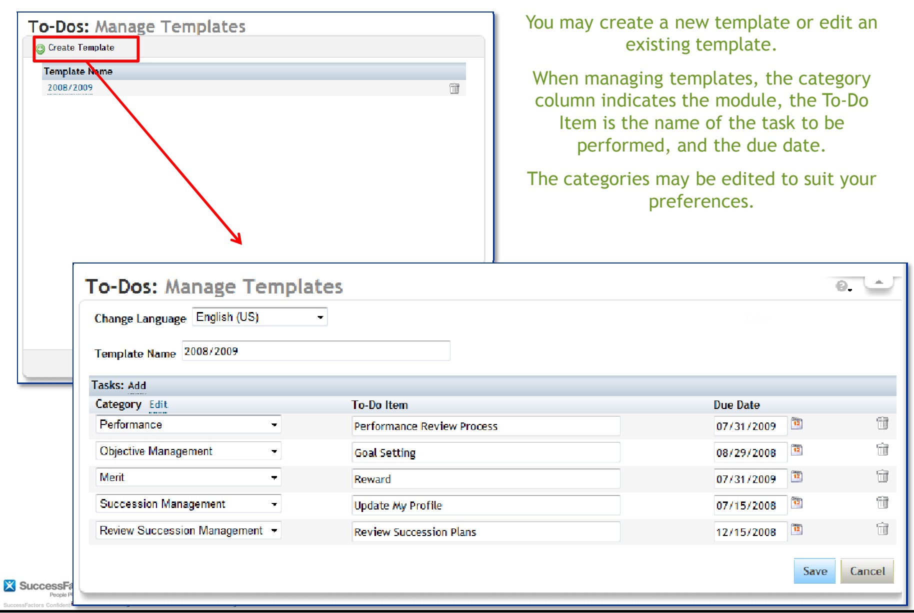
To-Do List



Select To-Do Admin to access the Admin Templates

To-Do List

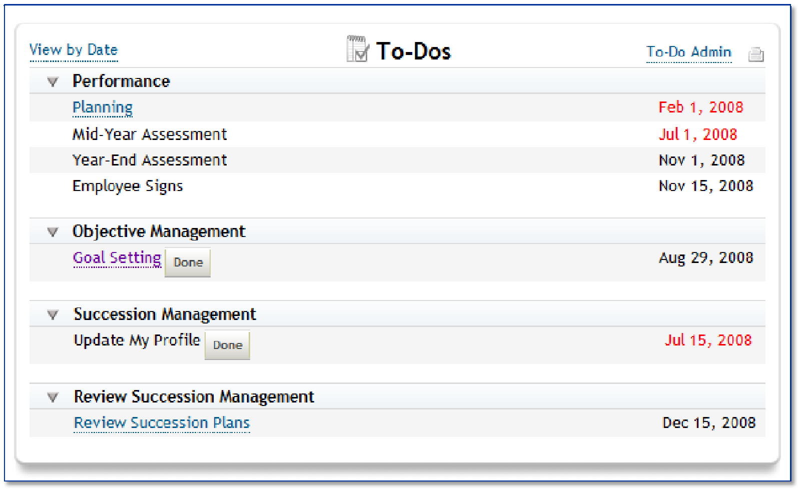


You may create a new template or edit an existing template.

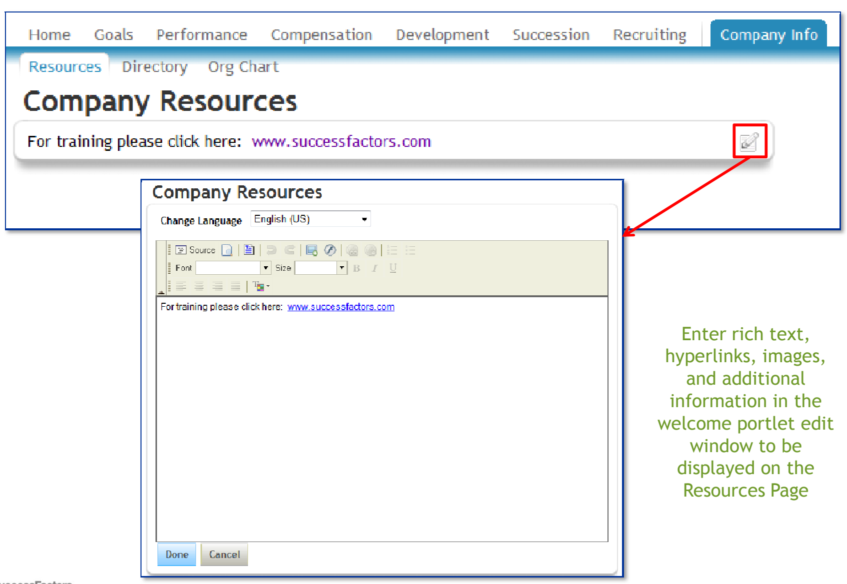
When managing templates, the category column indicates the module, the To-Do Item is the name of the task to be performed, and the due date.

The categories may be edited to suit your preferences.

To-Do List



Company Info - Resources



Enter rich text, hyperlinks, images, and additional information in the welcome portlet edit window to be displayed on the Resources Page

Additional Information for Reference

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Functions handled exclusively by SuccessFactors

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If you require any assistance with the following activities, please contact our support desk via the Customer Portal or 1-800-846-6503

- Post-implementation form template revisions (appraisals)
- New form template development
- System configurations not supported in the Admin Tools tab
- Goal plan configurations

Recommendations for Customer Success Team and/or Consulting Assistance

While care should always be taken in Admin Tools, there are some areas where you need to be very sure of what you are doing.

Area	Change	Call for Assistance
Route Maps (Form Templates)	Text - Comments - Mouseovers - Dates	- Order - Steps - Step IDs
Rating Scales (Form Templates)	Text	- Rate Numbers - Order - Number of Ratings
Competencies (Competencies)	Text	- Hard Coded Competencies - Family and Role Updates

Additional Resources

Resources

- Areas of support moving forward:
  - Administration job aid
  - This PowerPoint presentation
  - On-line help (Admin Tools page)
  - Your Professional Services Consultant
  - The Customer Success Team/PE Support
  - SuccessFactors University – Additional Training Services
    - Classroom Based Training / Web-Based Training
    - Materials Creation
    - E-Learning Tutorials

- SUPPORT:
  - **Customer Community:** http://community.successfactors.com
  - **Customer Success :** 1-800-846-6503
  - **Customer Portal:** http://www.successfactors.com/support/

OneVoice

ONEVOICE SuccessFactors

Welcome,

OneVoice is SuccessFactors' brand new Customer Advisory Board program. It was created to make sure all customers can have a voice in product direction and get all the information you need to make smart decisions about how best to use SuccessFactors products within your company. Each SuccessFactors product module has its own OneVoice group, each of which is moderated by one of our product managers. Monthly virtual meetings for each group cover what to expect in the next 90 days with that product, as well as providing a forum for discussing ongoing issues, concerns, and the overall product vision. Join one group. Join five. We want to hear from you. And we want to make sure you know what to expect from the products you've come to rely on - now and into the future.

Upcoming Meetings:

Compensation Management	July 15th, 11am PDT
Employee Profile	July 17th, 8am PDT
Succession Management	July 22nd, 8am PDT
Learning & Development	July 24th, 11am PDT
Analytics & Reporting	July 29th, 8am PDT
Performance Management	August 7th, 11am PDT

http://community.successfactors.com/onevoice

Questions?

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Thank you!

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